

RETIREMENT SYSTEM FINANCIAL DISCLOSURE REPORT

Pursuant to U.S.A.R.S. 42, § 121.4, each person who has or is seeking to obtain employment or other assistance from a retirement system shall file with the Board of Finance a financial disclosure report consisting of a statement of assets and liabilities, net worth, and income, and a statement of expenditures for the preceding year. The report shall be filed by January 1 of the calendar year in which the person is first employed by the retirement system, and by January 1 of the following year thereafter. A person who is not a retirement system employee but who is a member of the retirement system shall file the report by January 1 of the calendar year in which the person becomes a member. A person who is not a retirement system employee or member but who is a spouse or dependent of a retirement system employee or member shall file the report by January 1 of the calendar year in which the person becomes a spouse or dependent. A person who is not a retirement system employee, member, or spouse or dependent but who is a person who has or is seeking to obtain employment or other assistance from a retirement system shall file the report by January 1 of the calendar year in which the person is first employed by the retirement system.

Reports may be mailed or delivered to: Board of Finance, 2415 Grand Drive, Dallas, Texas 75201

OR

Report to: (214) 261-3787 or (214) 261-8380

REPORT COVERING:

G JANUARY 1 through JUNE 30, _____ - DUE BY AUGUST 15

G JANUARY 1 through DECEMBER 31, ____ x ____ - DUE BY FEBRUARY 15

1. Name:

____ Finley _____ Jacqueline _____ L _____
Last First MI

2. Business

Address: _____ 200 Crescent Court, Suite 1200 _____ Dallas, TX 75201
Street and No. City State Zip

Mailing Address: Same as above _____

3. Business Phone: _____ 214.756.6900
Area Code and Telephone Number

4. Employer: _____ Westwood Management Corp. _____

5. Employer's address: _____ 200 Crescent Court, Suite 1200 _____ Dallas, TX 75201
Street and No. City State Zip

6. Did you make an expenditure exceeding \$50 on one occasion for a retirement system official:

From January 1 through June 30? Yes ☐ No ☒
From July 1 through December 31? Yes ☐ No ☒ NA ☐

If the answer to either question in Number 6 above is YES, complete Schedule A and attach.

7. Did you make expenditures exceeding the sum of \$250 for a retirement system official:

From January 1 through June 30? Yes ☐ No ☒
From July 1 through December 31? Yes ☐ No ☒ NA ☐

If the answer to either question in Number 7 above is YES, complete Schedule A and attach.

FOR OFFICE USE
ONLY


Postmark Date: _____

8. PROVIDE BELOW (a) the name of the state or statewide public retirement system; (b) the aggregate total of all expenditures attributable to the retirement system made during the January 1 - June 30 reporting period; (c) the aggregate total of all expenditures attributable to the retirement system made during the July 1 - December 31 reporting period when applicable; (d) the aggregate total of all expenditures made in a calendar year attributable to the retirement system.

- 1) a. Name of Retirement System: Teachers' Retirement System of Louisiana
- b. Total of all expenditures made January 1 through June 30: \$ 0
- c. Total of all expenditures made July 1 through December 31: \$ \$18.34/person
(When applicable)
- d. Total of all expenditures made during the calendar year: \$ \$36.68
- 2) a. Name of Retirement System: _____
- b. Total of all expenditures made January 1 through June 30: \$ _____
- c. Total of all expenditures made July 1 through December 31: \$ _____
(When applicable)
- d. Total of all expenditures made during the calendar year: \$ _____
- 3) a. Name of Retirement System: _____
- b. Total of all expenditures made January 1 through June 30: \$ _____
- c. Total of all expenditures made July 1 through December 31: \$ _____
(When applicable)
- d. Total of all expenditures made during the calendar year: \$ _____

CERTIFICATION OF ACCURACY

I hereby certify that the information contained herein is true and correct to the best of my knowledge, information, and belief; that all reportable expenditures have been included herein; and that no information required by LSA-R.S. 42:1114.2 has been deliberately omitted.


Signature of Filer